The Cultural and Creative Sector in 5 Arab Mediterranean Countries: Skill-Mismatch and Active Labour Market Policies

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Abstract

The cultural and creative sector is a major determinant of the economic development. But Arab countries are still incapable of exploiting all its potentialities, while other developing countries are doing much better. Even though this sector is more and more alluring to Arab youth, especially after the Arab spring, yet a lot of artistic and creative activities are not considered as “real” jobs. Our study provides a conceptual framework for understanding the creative economy in Morocco, Tunisia, Egypt, Palestine and Lebanon. In order to address the main challenges to employability, we analyze the market structure in each country, with a view on the production, consumption and trade of creative goods and services. Finally, we suggest recommendations for active labour market policies aiming at enhancing employability in the cultural and creative sectors of the aforementioned countries.

Keywords: Creative industries – Cultural economy – Active labour market policies – Skill-mismatch

Introduction

The cultural and creative sector is a major determinant of the economic development in the information era. The international trade of cultural and creative industries (CCI) is one of the most dynamic in the global economy, and it has more than doubled between 2000 and 2011, while its average annual growth was 8.7% between 2002 and 2011. The value of this trade amounted to 424.4 billion USD in 2005 (3.4% of total trade), jumping to 624 billion USD in 2011 [United Nations, 2013]. This rapid growth in the CCS could be a powerful leverage for economic growth and job creation in the Arab countries. Yet, in a population among the youngest in the world, experiencing high unemployment rate, not all artistic activities are considered as serious vocations[76]. Our study provides a conceptual framework for understanding the creative economy in five Arab Mediterranean Countries (AMC): Morocco, Tunisia, Egypt, Palestine and Lebanon. Our aim is to identify major skill-shortages and other obstacles to employability, suggesting recommendations for policy-making.

The cultural and creative sector includes a wide range of activities, products and industries that are difficult to embrace in a strict definition, with classifications varying from one national context to another. Indeed, different terms could be found in literature, such as creative industry, cultural industry, cultural economy or even cultural-cognitive economy. In our study, we follow the broader term of “cultural and creative sector” (CCS), by which we mean the larger sphere that includes all cultural products and creative industries, following the UNESCO’s definition [United Nations, 2013]. The common feature of all these activities is that they require significant potential for creation and innovation, including artistic products, advertising, computer games, digital products, design and architecture.

The CCS in the five countries of our study is dominated by a large number of small businesses and non-profit associations, considered as the major actors of the art scene, while big institutional players such as museums and galleries have limited influence. Thus, young creators usually begin their careers through entrepreneurship and self-employment, starting very small enterprises or non-profit organizations, or even as independent artists or free-lancers (under various statutes of “freelancing”: formal, semi-formal, in-formal, casual, seasonal, etc.). In such a market structure, the skill-supply is maladjusted, especially in Higher Education Institutions (HEI) where the theoretical teaching leaves a small place to technical education, with the absence of managerial skills. Therefore, addressing this skill-mismatch is crucial for the economic development in the AMC, where unemployment is usually more common among graduates of HEI: a higher level of education tends to be associated with higher levels of unemployment [Martin and Bardak, 2012].

Since skill-shortage is one of the greatest defiance of the CCS in the AMC, Active Labour Market Policies (ALMP) are mostly required to avoid skill-shortages and enhance employment in a sector dominated by the

[76] According to our survey, poets and writers are highly respected in the AMC, looked at as serious artists following a noble vocation while musicians and plastic artists only receive recognition if they are renowned, but still considered with some appreciation as their arts are perceived as hard to learn, requiring lot of talents and natural gifts. Technical jobs (e.g. sounds and light) are less perceived as creative jobs, while careers in acting (especially for women) or dancing (especially for men) are still subject to lot of social and moral prejudice and controversy.

informal economy of culture. Informal jobs refer to workers who have no official contract or who do not benefit from social security coverage, and it concerns most professionals in the CCS. A major risk in the creative economy of the AMC is related to confusion between informal jobs and entrepreneurship. What are the challenges to employability in artistic and creative professions and what are the prospects of entrepreneurship and self-employment?

Our Survey was first conducted in 2015, as part of the European project, MEDCULTURE, funded by the European Commission. The project was dedicated to study skill-shortage, future occupations and future career opportunities, combining several complementary methodologies: analysis of key documents, investigation methods used in development projects, and interviews with key-informants and stakeholders from various backgrounds (including policy makers, cultural managers, artists, etc.). Therefore, we identified 5 major obstacles to employability in the CCS in the AMC: 1) the mismatch between the supply of skills and the market needs; 2) the weak synergy with the international scene; 3) the precarious state of local artists and cultural professionals due to the predominance of the informal economy of culture and the absence of large institutional players; 4) the lack of public funding and private investments, instability of funds and fluctuations of donors agenda; 5) the high "barriers to entry" for new firms and young professionals willing to be admitted to the market.

In order to understand how to address the main challenges to employability, we first need in-depth analysis of the structure of the CCS, with a view on the production, consumption and trade of goods and services (section 1). Secondly, we need to discuss specific challenges for each of our 5 countries (sections 2-6). Finally, a comparative analysis is conducted (section 7) before suggesting a set of recommendations for ALMP.

The morphology of the CCS in the AMC

The growth in export of the CCS in the AMC is close to the world's average, rising at an annual rate of 7.03% [UNCTAD, 2010]. However, the contribution of the sector to GDP remains low, compared to the rest of the developing countries. For the entire MENA region for example, the income from CCS amounted to 58 billion USD in 2013, only representing 3% of total revenue. This sector only occupies 1.1% of the GDP of the entire region [CISAC, 2015]. Moreover, this sector has been experiencing stagnation since 2008. Indeed, 14 of the 25 creative and cultural industries identified for North Africa by the United Nations are declining in exports, with an average decrease of 23.61% in audiovisual products, a decrease of 51.74% in new media products, and a decrease of 26.34% in visual arts products.

In 2012, Art Crafts became the largest exporting sector (49.88% of regional exports), especially with the export of carpets (33.60% of total export, with a 571 million USD value). The design represented 47.29% of exports in 2012, with a value of 541 million USD [UNCTAD, 2013]. Together, these two groups (Art Crafts and Design) amount to 97% of total exports of cultural and creative products. The remaining exported products do not exceed 3%, and therefore are primarily intended for the local market.

One of the major flaws of the employment and labour market in the AMC is the informal economy, when the informal jobs amount to 547,500 jobs in the CCS [CISAC, 2015]. This situation is common to most economic sectors. However, cultural professions are more subject to informality since occupations are mainly based on talent and individual creativity, offering more flexible careers, with greater potential for entrepreneurship and self-employment. Therefore, these jobs are more and more attractive for a young generation targeting a higher source of income outside of the traditional employment path. Nevertheless, when compared to other economic activities, the risk of unemployment is higher in the CCS, since creators are not ensured of the artistic recognition of their creations, and the artistic success of a project is not always positively correlated with higher profitability. Finally, the informal economy of culture is condemning young creators to spend a part of their career in a precarious situation, as they are often forced to accept an auxiliary job in order to ensure a more stable source of income, or at least to declare only parts of their cultural occupation on irregular, intermittent or seasonal basis.

The local market is very dynamic, yet there is weak synergy with international scene (e.g. Africa contributes to less than 1% of world exports of CCI). While other developing countries are doing much better, AMC are still incapable of exploiting all the CCS potentialities. The cultural goods and services are mainly produced through the informal sector, almost-exclusively designed for the local scene with very little exports (especially towards non-Arab countries).

Employability in the cultural and creative sector in Morocco

The CCS in Morocco is traditionally linked to heritage and handcrafts, with 15 clusters specialized in crafts like carpets or jewelry and only one dedicated to heritage. The construction sector is booming, driving a rise in the architectural and design sub-sectors. The publishing industry used to be a major component of the CCS, but it seems to experience stagnation, due to the digital turn. In 2009, this sub-sector used to occupy 1.8% of the labour force and generated revenues amounting to 370 million USD [United Nations, 2013]. There are currently 20 editors and 4 to 5 distribution companies to 100 libraries scattered throughout Morocco [UNIDO, 2015]. In the last two decades, the CCS in Morocco was diversifying its assets by developing a hub for the cinema industry, producing today more than 15 movies per year [UNIDO, 2015].The boom in the film industry is due to the strong support of the Moroccan Cinematographic Centre as well as the Higher Institute of Cinema Crafts and Audiovisual Arts, both benefiting from the Moroccan diaspora and the diplomatic network of the country.

There are currently some ALMPs in Morocco supporting employability in the CCS by promoting self-employment or facilitating the transition to the labour market. Since 2003, Moroccan artists have been given access to social benefits, entitling them to a national artist card. In 2007 the *Mutuelle Nationale des Artistes* was founded under the patronage of the Ministry of Culture. It aims mainly at defending labour rights of artists and at improving their social situation. While the Ministry of Culture manages 7 exhibition halls, the priority is currently given to the creation of the National Museum of Archaeology and Earth Sciences as well as the National Higher Institute of Music and Dance. In 2011, the Ministry of culture implemented a new "proximity policy" in the cultural field, a program that is tailored to local/community level, while encouraging diplomacy, good governance, better regulation within the cultural Affairs, and decentralization (e.g. 16 directorates in Morocco are working for the establishment of festivals in each region) [Kessab, Bensliman,2013].

But the major challenge remains the defections in the regulatory framework. Firstly, the sector suffers from the lack of protection of intellectual property right [Helly, 2014]. Secondly, the Moroccan Labour law of 2003 remains the general framework for artist’s employment. More specific laws targeting artists are needed. Finally, the cultural budget remains insufficient to boost the employment in the cultural sector. The budget of the Ministry of Culture represented approximately 0.20 % of total expenditure in the last decade, way below the 1% prescribed by UNESCO. Nevertheless, the structure of the cultural budget has undergone significant changes, with a decrease in the share of operating expenses and an increase in investments and capital expenditures, in line with the governmental reforms which recommend reducing the fiscal deficit while supporting public investments. Thus, in 2005, capital expenditures of the Ministry of Culture did not exceed 25% of the total, while they increased to 45% in 2015 [Kessab, Bensliman, 2013].

Employability in the cultural and creative sector in Tunisia

The CCS in Tunisia is largely composed of traditional handcraft and art craft: 117000 craftsmen are registered at the National Handicrafts Office, 12000 workshops at the Industry and Innovation Promotion Agency and 10000 handcrafted furniture firms at the Technical Center of Wood Industry and Furniture [UNIDO, 2015]. Audiovisual arts and the media sector are also expanding. After Art crafts, they are the second employer in the CCS in Tunisia, and the most appealing to youth [UNESCO, 2013]. They are followed by the design industry involving 300 to 400 professionals [UNIDO, 2015]. As for the film industry, it is still very dependent on international funding due to the decrease in the number of movie theaters (from 120 in 1956 to 10 in 2013). For this reason, actors, artists and filmmakers are forced to work for TV [Helly, 2014]. Furthermore, major funds dedicated to the CCS in Tunisia are captured by festivals, with 400 festivals a year [UNESCO, 2007]. The dominance of the festivals economy may be at the expense of other artistic initiatives and may increasingly be crowding-out independent artists, or absorbing large parts of the public funding.

The Tunisian state has long supported arts and cultural move, through legislation, policymaking and policy implementation. For example, Tunisia was the first Arab country to sign a bilateral agreement on cultural cooperation (with Algeria in 1963) [Al Mawred Al Thaqafy, 2010]. This particular interest in culture has escalated after the Arab Spring with cultural affairs receiving larger cuts within the national budget. Indeed, cultural expenditures increased from 84.4 million USD in 2010 to 107.2 million USD in 2011, an increase of 27% [Kessab, Bensliman, 2013]. The budget of the ministry of culture constituted 0.64% of the total budget in 2013. Therefore, the Tunisian government is tending to reach the target of dedicating 1% of its national budget to culture, as advised by UNESCO.

ALMPs implemented by the National Agency for Employment and Autonomous Work are targeting youth and aiming to develop complementary programs such as training courses. They also try to provide some of the lacking skills to youth, encouraging entrepreneurship and playing the role of an intermediary between the universities and the labour market[77]. However, between 2004 and 2013, the high demand for cultural and creative goods in Tunisia outpaced the local production, thus imports of creative goods are by far higher than exports. This situation can be explained by two correlated phenomena: the insufficient job creation on the Tunisian labour market[78], and the polarization effect in the employment market, resulting in a widening gap between higher and lower income jobs. Therefore, after the 2010 revolution, the link between education and

[77] One of the key missions of ALMPs is to promote training and internships in order to facilitate the transition to professional life, for example by giving the trainee an allowance of 73.5 dollars per month to be added to what they are already receiving from their internship.

[78]The last employment survey conducted in 2012 showed that the additional applications for new jobs increased by 80.4% on average, while the job creation was 60.7% on average between 2007 and 2012. In addition, the number of informal workers or self-employees was not counted in official statistics.

employment has almost disappeared. Despite the increase in the cultural budget, the market is still suffering from insufficient job creation [Kessab, Bensliman, 2013]. Moreover, Tunisian artists mostly live in poverty. Artists declaring their activity to the state receive social benefits, such as health care, cash benefits, retirement pension, and disability benefits (the law 2002-104 from the 30th of December 2002). Yet the union fees are set to 11% of the income and the social security is partly funded by small yet variable fees on ticket prices (Presidential Decree 2003-457 of 24th of February 2003). Independent artists have an automatic 15% withholding on their revenues or contract to finance coverage. Thus, a lot of artists prefer to work in the informal economy given the high level of taxation.

Employability in the cultural and creative sector in Egypt

Like other Arab countries, some segments of the CCS are experiencing significant growth in Egypt, especially architecture, design and digital creation, even though today they seem to be saturated. Egypt counts more than 100,000 architects with 6000 new entrants each year. The growth in the advertising industry and the new media is certainly helping in absorbing part of freshly graduate designers and web-developers, but these professions are precisely those who suffer the most from informal, occasional or irregular jobs. Crafts and traditional arts (Nubian decorative arts, pottery, ceramics, etc.) are less attractive for new entrants and the number of professionals is declining. Young artists are mainly attracted to music, theater, cinema, and design at the expense of the so-called “traditional programs” (art craft, pottery, leather carpets, etc.) [UNIDO, 2015]. However, even in the growing segments of the market, experts complain from the lack of technical skills (especially: sound, lighting, installation, set design), and from the lack of professionalization among young graduates. Workers occupy several jobs at once, which lead to the lack of specialization and to the non-sustainability of skills acquired through training and/or professional experience. At this level, a major failure is the lack of training in cultural management and the problem of uncertainty in assembling and managing cultural projects: many cultural events may be canceled at the last minute, with no specific regulatory framework and incomplete contract.

One of the most important traits of the Egyptian market is that skill-supply in the cultural sphere is not only limited to universities, since technical centers and vocational education and training (VET) provide the largest number of professionals working in the CCS. However, it is widely acknowledged that Egyptian universities offer a better education, when compared with VET, even though they do not necessarily increase the probability of finding a job, since the unemployment rate of graduates’ remains higher than that of VET. Therefore, VET is not followed as part of a long-term strategy; it is rather the second best choice, since it is less risky, and of shorter duration than the initial education [ETF, 2014b].

The Ministry of Culture and the Supreme Council for Culture are in charge of the cultural policy in Egypt. But it is difficult to analyze their cultural expenditures as they are incorporated into a larger item called "Recreation, Culture, and Religion". Shifts in public spending can therefore hardly be retraced in a linear fashion. However, financial resources are certainly insufficient. In 2011, the cultural budget amounted to $ 188.5 million USD, or 7.2% of the budget of "Recreation, Culture, and Religion" (which itself constitutes 3% of the total budget). This budget shows that the office of the Palace of Culture received the lion share of the national budget allocated to culture (23.7%) followed by the Central Administration for Cultural Development (with 13.9%) and by the National Cultural Center (Opera) and the Academy of Arts (9.4% and 8.6% respectively). It is noteworthy that the National Film Center receives a marginal part of the budget (1.1%) [Kessab, Bensliman, 2013]. Between 2006 and 2015, the volume of the budget for "Recreation, Culture, and Religion" increased in the same proportion as the total budget, so we estimated that the share of cultural spending in the total budget has remained practically unchanged, around 0.25% of the total budget on average. Similarly, the functional classification of the 2013-2014 shows that cultural spending continued to evolve in the same proportion as the total budget.

One can legitimately question the effectiveness of these expenditures, since much of this budget is spent on running costs, specifically wages and salaries (around 60% of the total budget allocated to the "Recreation, Culture, and Religious Affairs", between 2009 and 2014). This budget also covers the purchase of goods and services, while only 6% of the budget is dedicated to grants, scholarships and aid funds. Finally, capital expenditures are dedicated to renovation of buildings (Opera, Palace of Culture, etc.) and the management of public institutions and public spaces, so they do not directly benefit creators and artists.

Employability in the cultural and creative sector in Palestine

Palestine has a large number of universities for a small country (49 higher education institutions (HEI), including community colleges) [EACEA, 2012]. The skill supply in the CCS is mainly provided by HEI while their programs suffer from outdated contents and inadequate skills. Paradoxically, VET is often considered as offering better programs but they are avoided by the majority of Palestinian students (unlike Egypt, where the VET trains the largest number of workers while considered of lesser quality).

In the last 20 years, the Palestinian economy has experienced an expansion of its tertiary sector and a shift to an economy of services. Unlike

Egypt, a small share of the labour force works in agriculture (10%) while the majority of workers are employed in the tertiary sector, especially in commercial services, restaurants and hotel industry, education and health, while the youth is more and more attracted to the CCS, mainly by cook or chef training, advertisements, design and digital training (web development and multimedia, copyrighter). These segments are experiencing significant growth due to the sufficient supply of "average skills" or "intermediate skills", through community colleges (two-year training programs). Because the Palestinian labour market is more flexible than that of Egypt, young graduates are more adaptable to market changes: they give priority to short programs at the expense of “highly qualifying” but over-saturated programs (as architecture and engineering) where graduates are often required to perform executive or administrative tasks not much related to their initial education. Therefore, the newly uprise in decorative arts, jewelry (particularly silver), ceramics, glass design, is outpacing traditional handcrafts (as embroidery, soap, olive wood products, etc.), due to the adequate training offered by some VET and NGOs (such as Dar al-Nadwa and Dar al-Kalima), through foreign funds and cooperation from international well-known artists and trainers. Compared to university courses, these short programs offer better distribution networks, and engage significant exchange of expertise with international artists who often come to Palestine to work on a voluntary basis. Finally, some of these training programs or workshops lead to cultural events (exhibitions or festivals) that help the diffusion of young local creators and artists, while having an important community impact (empowerment for women, refugees, etc.).

It is possible to identify some clusters in the fields of cultural and creative industries that could experience a significant growth in the future, despite the lack of public support: embroidery and leather goods in Hebron, furniture in Nablus and Salfit, marble and textiles in Bethlehem [UNIDO, 2015]. Nevertheless, it is necessary to distinguish between two different employment areas, the Gaza Strip and the West Bank, as well as two segments of the labour market: the public and the private. Regarding employment in the private sector in Gaza, the average salary is 200 USD/month for a technician working in sound or light (in the private or local radio or even television), while wages are considerably higher in the West Bank (around 300 USD for an equally qualified technician).Having said that, the competition is stronger in the West Bank with a more flexible market. For example, in Gaza, it is more difficult for newly graduates to enter the labour market in its formal segment, as new opportunities are limited and the market is well controlled by established professionals who rarely give any chance to outsiders (there are high barriers to entry that are based on clientelism and patronage, personal relationship, etc.). Most graduates will therefore turn to informal jobs and rely on volunteering, mutual aid and solidarity to ensure the production of cultural events. In the West Bank, the market also suffers from an overflow of the informal political economy of culture.

Yet, the major failure in the CCS is the lack of direct support from the Palestinian authorities. Thus, there is no real political support for creators and the cultural policy is merely symbolic. Still, the state remains the first employer in the country, and the Ministry of Culture is the largest employer in the CCS. But financial resources are limited and recruitment is often linked to rent-seeking and fictitious jobs. Cultural funding therefore is mainly dependent on international aid, which leads to a lack of coordination in the cultural action, thus jeopardizing the sustainability of the cultural activity with each shift in the donor's agenda [Dragicevic, 2015]. For example, the Gaza war in 2014 resulted in a drastic decline of international cultural funding, since humanitarian action is often competing with Culture. Finally, the major actors in the Palestinian cultural scene remain the NGO's, community engagement programs and initiatives that use culture as a tool to defend the Palestinian identity, as well as the cultural and historic Heritage of Palestine.

Employability in the cultural and creative sector in Lebanon

The Lebanese CCS is mainly composed of small and medium enterprises (SME). The creative industries identified by UNIDO in 2015 throughout Lebanon are related to arts, crafts[79] and recently to design and architecture. However, *haute couture* sector and audiovisual are the only activities experiencing an important expansion. Moreover, imports remain far above exports in the whole sector. Between 2003 and 2012, the growth rate of exports was 8.20%. However, from 2008 to 2012, there was a decline in this rate to -3.91%, while architecture, design and fashion design are the only products that are still experiencing some increase in their export rates [UNCTAD, 2013].

There is currently no clear development strategy for the CCS in Lebanon. The latest data on the budget of the Ministry of Culture goes back to 2012. This budget has been growing steadily since 2006 but its share in GDP remains almost constant, at around 0.5% of the GDP. Other ministries are also interested in the CCS. The Ministry of Social Affairs is particularly involved in the craft sector and its promotion. The Ministry of Tourism participates in the organization of festivals. Some municipalities also contribute to the promotion of artistic events [Al Mawred Al Thaqafy, 2010].

[79] Contemporary art, copper production, cutlery, furnishings, haute couture, textile production, jewelry, leather, publishing, traditional clothing, worm blowing, weaving in several forms, silk, straw, pottery, tapestry [UNIDO, 2015].

Overall, Lebanon hosts annually at least 54 regular festivals according to our calculation. This boom of the festival economy exasperates numerous independent artists who remain excluded from official channels of festivals, and who perceive them as a symptom of the domination of pop culture and mainstream art. Indeed, the use of festivals as a tool exclusively intended to the growth of tourism does not really serve the interests of the creative and cultural professionals.

As for the cultural and creative education, the major trait of Lebanon is that the skill-supply is mainly left to private universities. The dynamic CCS in Lebanon depends largely on sustainable private initiatives, benefiting from the freedom of expression which distinguishes it from other AMC. Subsequently, in the absence of a clear and comprehensive public vision, the civil society and the private sector provide the creative and artistic infrastructure, while being more effective than politician-sponsored interventions (such as the numerous time-limited cultural festivals that are only submitted to the interest of the food-industry). However, private initiatives are poorly coordinated and cannot be sustainable in the long term, in the quasi-absence of public funds.

Conclusion: Comparative analysis of the 5 countries

Across the 5 countries of our study, we found that there is few ALMP specifically designed for CCS or targeting cultural professions. The current cultural action is suffering from the insufficient level of public funds (around 0,25% of total budget in all AMC, except Tunisia, only country that seems close to the recommended 1%), while the cultural budgets are evolving in the same proportion as the total budget, showing no cultural development strategy.

Country	Morocco	Tunisia	Egypt	Palestine	Lebanon
CCI experiencing growth	- Heritage - Traditional Handcraft - Film industry - Architecture	-Art craft - Traditional Handcraft - Audio-visual - Media sector - Design industry	- Architecture - Design - Digital creation	- Audio-visual - Arts - Digital creation - TV and Radio - Sound and light technicians	- Haute couture - Audio-visual - Design -Architecture
CCI experiencing decline	- Publishing industry	- Film industry	-Crafts -Traditional arts	- Embroidery - Leather goods - Furniture, Marble and	- Arts - Crafts

				textiles	
Universities	- National Institute of Fine Arts - the Institute of Fine Arts - The Higher Institute of Dramatic Art and cultural animation - National Institute of Archaeological Sciences and Heritage - Mohammed V Foundation for Solidarity - Higher Institute of Cinema crafts and audio-visual arts - CASAMODA Academy Fashion Design	- Schools of Fine arts exist in major public universities	-Academy of Arts -Faculty of Arts at Cairo University -Faculty of Fine Arts of the University of Alexandria -American University in Cairo -Faculty of Arts at the University Ain-el-Shams	- Al-Quds University in Jerusalem - An-Najah National University - Bethlehem University - Bir Zeit University - Al-Aqsa University - Islamic University -University of Dar El Kalima	- Private universities such as American university of Beirut, Université Saint Joseph, Esmod, Alba, Lebanese American University
Budget dedicated to culture *(2013)*	0.23 %	0.64%	0.25%	0.003%	< 1%
Main agents of the cultural and creative scene	- Ministry of culture - Moroccan diaspora - Diplomatic network of the country	- Ministry of Culture - Ministry of Tourism - Local communities -Tunisian diaspora	- Ministry of recreation, Culture, and Religion - Ministry of education - Union of artists - State artists	- Ministry of culture -International NGO's	- Ministry of social affairs - Ministry of tourism - Private sector - International NGO's
Exports CCI (2004 -2013, average, million USD)	27.90	59.84	185.04 *(Period : 2008-2013)*	3.95 *(Period : 2007-2013)*	149.70
Import CCI (2004 -2013, average, million USD)	320.99	187.88	173.66 *(Period : 2008-2013)*	17.28 *(Period : 2007-2013)*	146.25

Table 1: Comparative analysis between the CCS in the AMC

More importantly, the structure of the cultural budget shows the predominance of current spending, wages, maintenance and renovation of buildings but insufficient grants and public investment. The local artists can still count on international funds, but this over-dependence is threatening the sustainability of the cultural action: changes in the donor's agenda may jeopardize the work of NGOs and independent artists, while humanitarian action is often competing with the cultural action. Since governments do not consider cultural policy as a central priority, the CCS in the AMC is experiencing perpetual fluctuations in the cultural budget and suffering from the non-sustainability of cultural funds.

The skill-supply by universities and training centers in the AMC is largely dominated by the State, making it difficult to reform programs and curricula (except for Lebanon). Moreover, ALMP suffer from the absence of forecast for the labour market and the lack of tools to identify needs and anticipate future skills. Similarly, HEI suffer from the quasi-absence of qualification framework and the lack of well-defined curricula. On another hand, young artists occupy various auxiliary jobs in parallel, which raises the issue of the sustainability of acquired skills.

Another major institutional failure is related to the weak artistic distribution. The infrastructure responsible of the diffusion of culture (museums, galleries, concert halls, libraries, etc.) is insufficient. In countries where cultural professions are mostly regulated by unions (Egypt, Tunisia), artists with the lowest income are incapable of ensuring their regular fees payment and turn to informal jobs. The current art scene is restructured around small associations that bring together creative youth. Lots of these associations are individual initiatives, gathering 2 or 3 persons, relying on volunteering and solidarity. The associative status often excludes these creators from public funds and official networks, threatening the continuity and sustainability of their activities. Moreover, it is difficult for newly graduates to enter the labour market in its formal segment, as it is well controlled by established professionals with high barriers to entry.

In our survey, we identified 5 major obstacles to employability: 1) the skill-mismatch; 2) the weak synergy with the international scene; 3) the precarious state of local artists and the predominance of the informal economy of culture with the absence of large institutional players; 4) the lack of public funding and private investments, with the instability of the funds; 5) the high "barriers to entry" for new firms and young professionals. Therefore, a set of 5 recommendations could be suggested in order to meet the challenges of employability in the coming years.

Firstly, the budget of ministries of culture should be increased and restructured, in order to meet the recommended 1% of the national budget, as advised by UNESCO. More transparency is needed, in order to assess the efficiency of public expenditures and to adjust the cultural policy. The structure of the cultural budget should also be adjusted, by increasing public investments, public grants and the capital expenditures, and decreasing the functional expenditures (as in the Moroccan case).

Secondly, better synergy between the local and the international scene is needed. ALMP should be supporting the international cultural action within the existing programs and dedicating more funds for cultural action abroad (e.g. Ministry of tourism). Public entities need a better coordination with international donors in order to ensure a more coherent cultural action and a more sustainable cultural development.

Thirdly, ALMP should improve the attractiveness and the quality of VET. VET strategies are approved, there is a need to accelerate the implementation of reforms and promote them by involving the private sector and increasing their attractiveness among young people. Policymakers need to develop more participative methods, while designing and implementing VET strategies: higher investment is needed; better governance, especially better coordination between ministries. Specific policies should target the CCS and its specific needs, and not merely focus on commercial and industrial trainings and programs.

Fourthly, better Higher Education Institutions are needed in order to reduce the skill mismatch. Universities and vocational centers should adopt the "competency approach" and implement well-defined curriculum (Bologna Process). Certified programs should define the professional knowledge expected from freshly graduated students in coherence with the market needs. Better cooperation with private companies and other certified programs is needed, in a context of a lack of national qualification framework for most cultural occupations.

Finally, better inclusive policies are needed for better jobs in the creative sector. Since labour markets are suffering from high segmentation and inequalities, the cultural development depends on other reforms, such as social policies aiming to protect diversity and equality, especially fighting gender inequalities (the image of the female artist is still suffering from social and moral prejudices), regional disparities and poverty features (the majority of artists are suffering from precarious conditions) and to promote the protection of intellectual property.

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